

Electronic Subcontracting Reporting System (ESRS) Administrators Guide 1.2

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Quick Reference:

The two most commonly performed actions on the ESRS system are:

- 1.) Approving / Rejecting Reports10**
- 2.) Approving / Rejecting Agency Contact Registrations.....19**

1. Log-In to ESRS

1.1 Existing Users

- I. Point your browser to <https://www.esrs.gov/government/>
- II. Login to ESRS by typing your e-mail address and password.
- III. Click "Go"

Government Users Login Screen

The screenshot shows the eSRS Government Users Login Screen in Microsoft Internet Explorer. The browser window title is "eSRS Test - Microsoft Internet Explorer". The address bar shows the URL. The page header includes the eSRS logo, "Integrated Acquisition Environment", "Electronic Subcontracting Reporting System", and "FOR GOVERNMENT". The date and time are "Thursday, September 8, 2005 | 11:59 am" and it is "powered by simplicity". The main content area has a "Welcome Government Users" message and tabs for "eSRS Sign-In", "Register", and "Forgot my password". The "eSRS Sign-In" tab is active, showing fields for "Email Address" and "Password", a checkbox for "Keep me logged in on this computer", and a link "Not a government user? Click here.". Below the fields are "Go" and "Reset" buttons. A large blue arrow points to the "Go" button, with the text "III." next to it. The status bar at the bottom shows "Done" and "Internet".

1.2 New Users

- I. Point your browser to <https://www.esrs.gov/government/>
- II. Click on the "Register" tab.
- III. Select your Agency.
- IV. Complete the forms, clicking continue after you have completed each section.
- V. On the last step, please review the information and click "Submit Registration"
- VI. You will receive an e-mail after registering. Please follow the directions in the e-mail that you receive.
- VII. After confirming your account, you will see an "Account Confirmation Successful" message. You must now wait for approval by a government official.
- VIII. Once you have been approved, you will be sent another e-mail.
- IX. You may now login to the system by following "Section 1.1, p. 4" of this manual.

2. Home

- I. Login to ESRS.
- II. You will be directed to your ESRS homepage. (Depending upon the level of your account, the homepage and navigation menu may appear differently)
- III. On the left hand side of the screen, the navigation menu is shown. This menu is available throughout all pages on the system.
- IV. "Pending Actions" will display all items in the system (that your account has access to) with the status "pending".
- V. Announcements are created by administrators. For more information on how to create announcements, please review "Section 3" of this manual.
- VI. Finally, when you have finished using the system, please click on the "Logout" link on the top of every page.

Government Users Login Screen

The screenshot shows the eSRS Government Users Login Screen in a Microsoft Internet Explorer browser window. The page has a blue header with the eSRS logo and the text "Acquisition Environment Subcontracting Reporting System". A navigation menu is on the left, and the main content area displays "Pending Actions" and "eSRS Statistics".

Callouts I-VI point to specific elements on the screen:

- I.** Points to the "Login" link in the top right corner.
- II.** Points to the "Logout" link in the top right corner.
- III.** Points to the navigation menu on the left side of the screen.
- IV.** Points to the "Pending Actions" section in the main content area.
- V.** Points to the "Announcements" section in the main content area.
- VI.** Points to the "Logout" link in the top right corner.

The "Pending Actions" section lists:

- 3 New Agency Contact Registrations
- 21 Individual Report(s) Pending
- 15 Summary Report(s) Pending



The "eSRS Statistics" table shows:

Category	Count
Contractors	7145
Contacts	148
Agencies	985
Agency Contacts	155
Contracts	27121
Accepted Individual Subcontract Reports	11
Accepted Summary Subcontract Reports	23

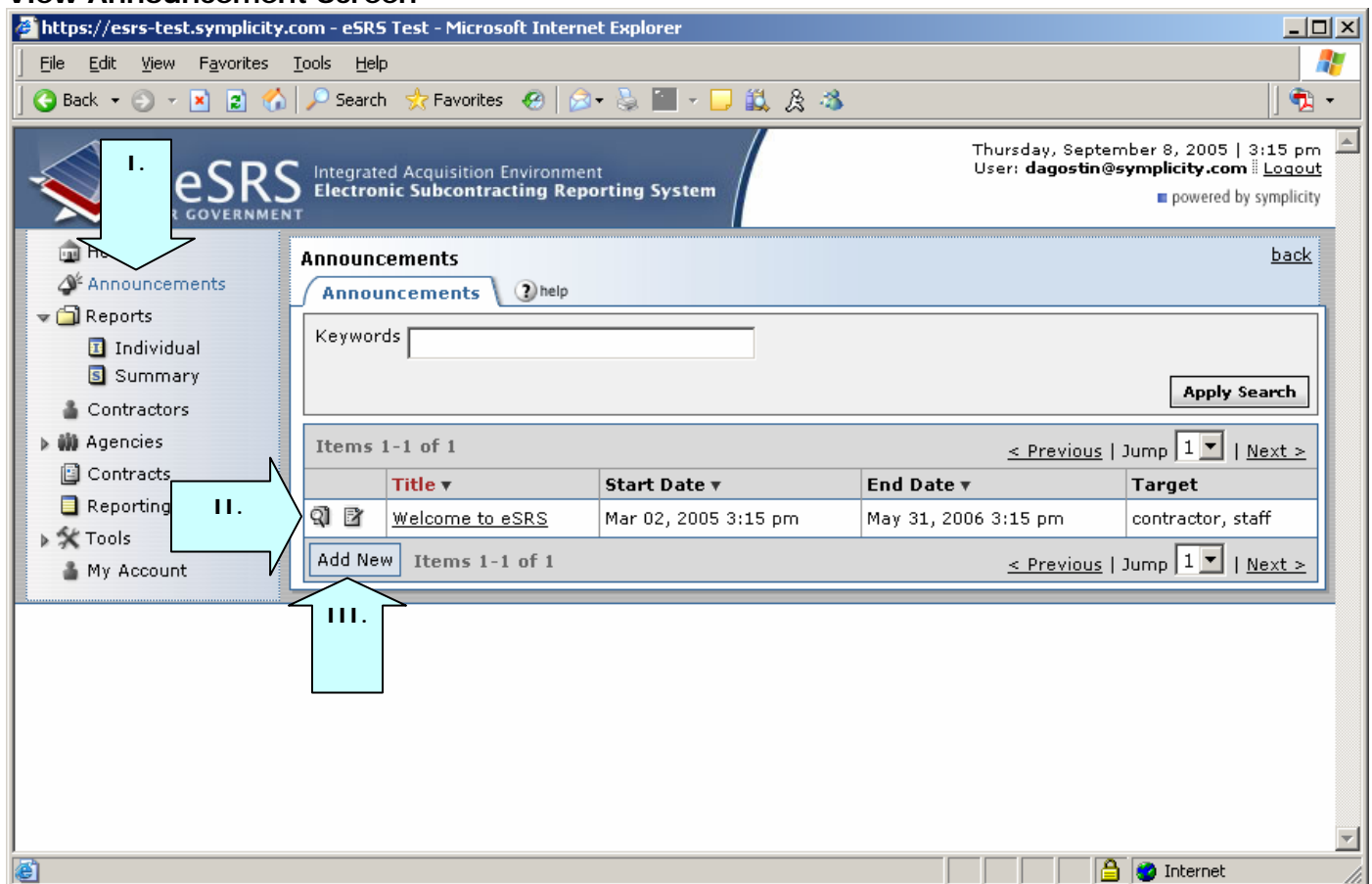
The "Announcements" section displays a welcome message: "Welcome to eSRS! The future of Electronic Subcontracting Reporting." dated Mar 02, 2005 3:15 pm.

3. Announcements

Announcements enable administrators to publish targeted messages to system users. Published announcements will appear in designated user's home page.

- I. View a list of announcements by clicking on "Announcements" on the left navigation menu.
- II. View and/or edit current Announcements by clicking on the Edit icon  or Review icon .
- III. Create a new announcement by clicking the Add New button.

View Announcement Screen



The screenshot shows the eSRS web application interface. The top header displays the eSRS logo, the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System", and the user information "Thursday, September 8, 2005 | 3:15 pm User: dagostin@simplicity.com | Logout". The left navigation menu includes links for Home, Announcements, Reports (Individual, Summary), Contractors, Agencies, Contracts, Reporting, Tools, and My Account. The main content area is titled "Announcements" and features a search bar with the label "Keywords" and an "Apply Search" button. Below the search bar, a table displays a list of announcements. The table has columns for Title, Start Date, End Date, and Target. The first row shows an announcement titled "Welcome to eSRS" with a start date of "Mar 02, 2005 3:15 pm" and an end date of "May 31, 2006 3:15 pm". The target is listed as "contractor, staff". Below the table, there is an "Add New" button and a pagination control showing "Items 1-1 of 1".

Title	Start Date	End Date	Target
Welcome to eSRS	Mar 02, 2005 3:15 pm	May 31, 2006 3:15 pm	contractor, staff

- IV. Label the announcement in the Title field.
- V. Type your message in the body.
- VI. Select the dates and timeframe that the announcement should be active.
- VII. Designate the target audience of the announcement.
- VIII. Click on the "Submit" button when you are finished.

Create Announcement Screen

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Announcements

- Reports
 - Individual
 - Summary
- Contractors
- Agencies
- Contracts
- Reporting
- Tools
- My Account

Core ? help

Submit Save Cancel Cancel Edits Delete

Announcement Information * indicates a required field

Title*:

Body*:

Times New Roman 3 (12 pt) Normal B I U S x₂ x² aBc

Path: body

Start Date: 2005-09-08 Select Clear 03 15 pm Clear


End Date: 2005-09-08 Select Clear 03 15 pm Clear

Target*: ☐ staff ☐ contractor

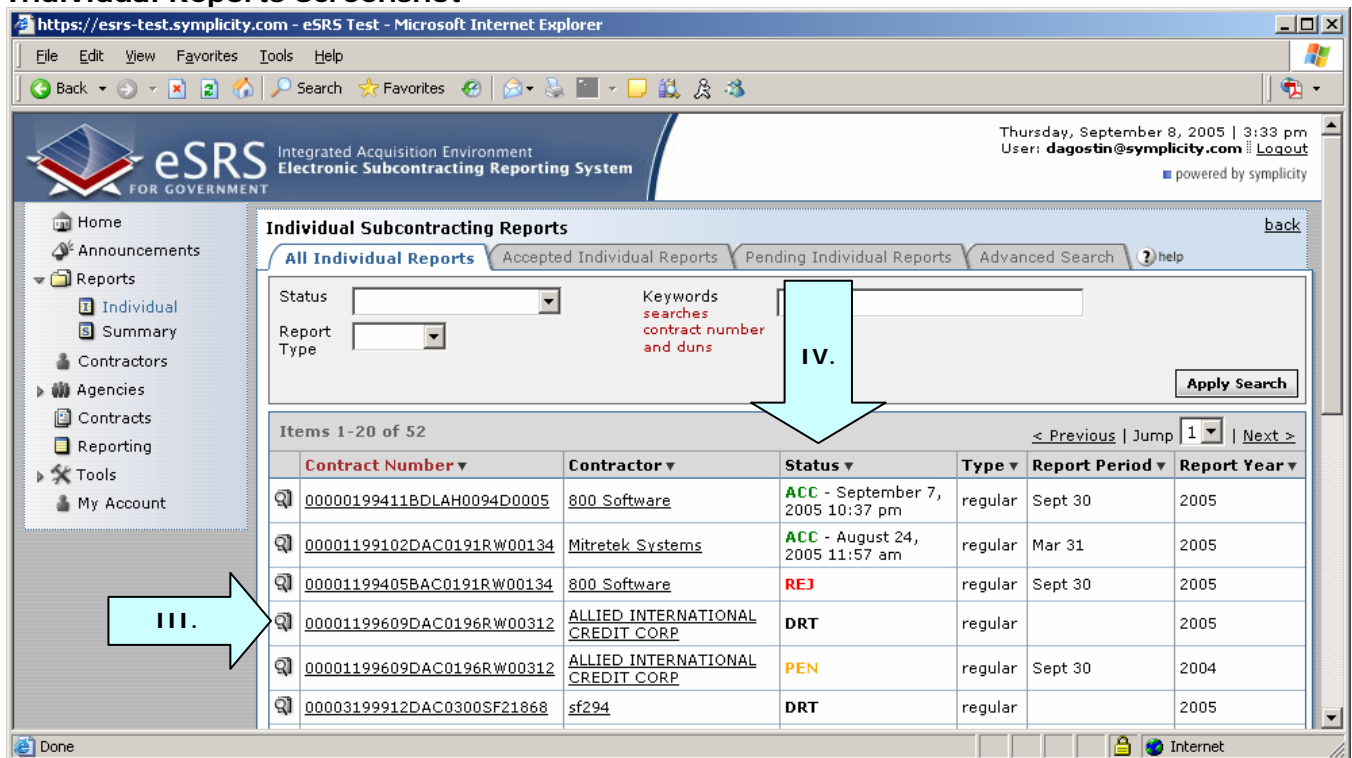
Done Internet

4. Reports

4.1 Individual

- I. Click on "Reports" and then "Individual" on the left hand navigation menu.
- II. You will see a screen similar to the Individual Reports Screenshot below.
- III. Click on the  View Icon beside any report to see more information regarding the filed report.
- IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▼) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a **maroon** color.
- V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
- VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.

Individual Reports Screenshot



https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Thursday, September 8, 2005 | 3:33 pm
User: dagostin@simplicity.com | Logout
powered by simplicity

eSRS Integrated Acquisition Environment
Electronic Subcontracting Reporting System

Home
Announcements
Reports
Individual
Summary
Contractors
Agencies
Contracts
Reporting
Tools
My Account

Individual Subcontracting Reports [back](#)







All Individual Reports Accepted Individual Reports Pending Individual Reports Advanced Search ? help

Status: Keywords:
Report Type: **Keywords searches contract number and duns**

IV.

Apply Search


Items 1-20 of 52 < Previous | Jump 1 | Next >

Contract Number ▼	Contractor ▼	Status ▼	Type ▼	Report Period ▼	Report Year ▼
 00000199411BDLAH0094D0005	800 Software	ACC - September 7, 2005 10:37 pm	regular	Sept 30	2005
 00001199102DAC0191RW00134	Mitretek Systems	ACC - August 24, 2005 11:57 am	regular	Mar 31	2005
 00001199405BAC0191RW00134	800 Software	REJ	regular	Sept 30	2005
 00001199609DAC0196RW00312	ALLIED INTERNATIONAL CREDIT CORP	DRT	regular		2005
 00001199609DAC0196RW00312	ALLIED INTERNATIONAL CREDIT CORP	PEN	regular	Sept 30	2004
 00003199912DAC0300SF21868	sf294	DRT	regular		2005

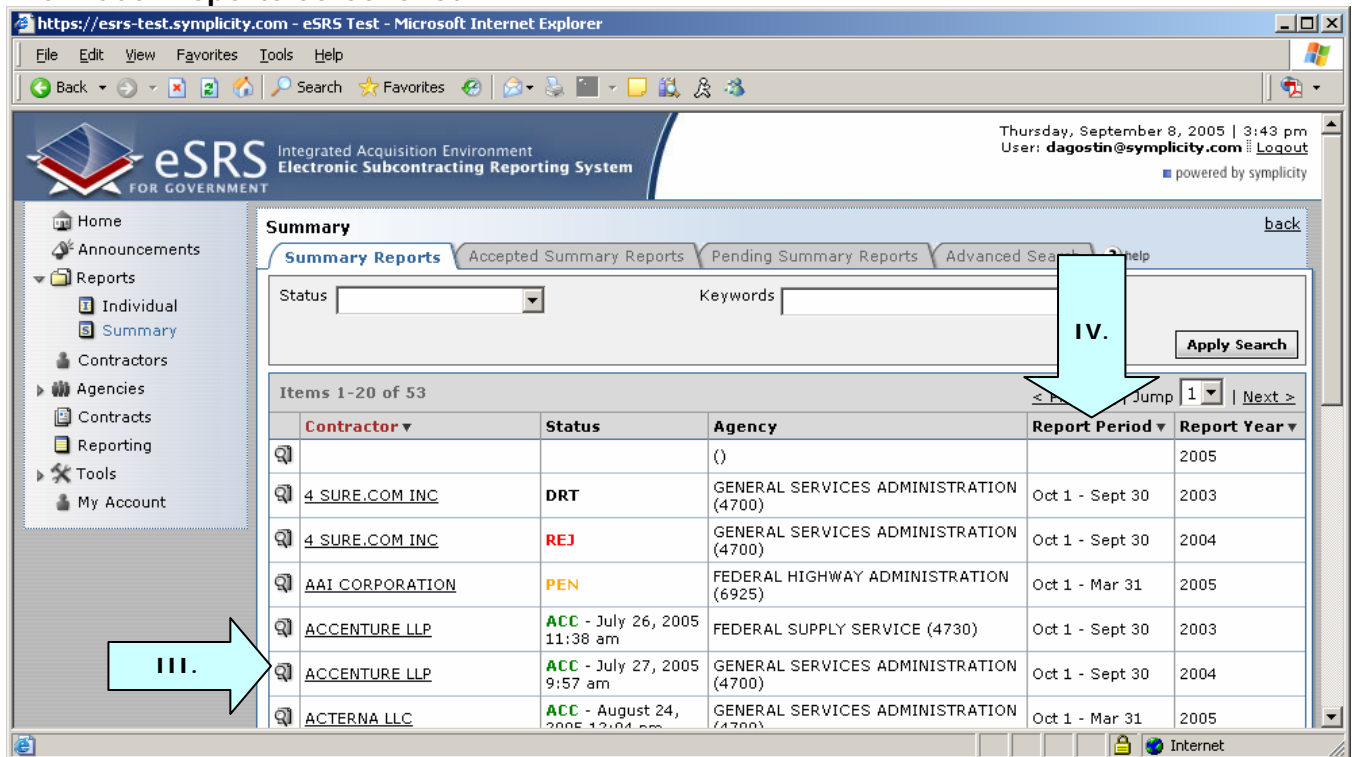
III.

Done Internet

4.2 Summary

- I. Click on "Reports" and then "Summary" on the left hand navigation menu.
- II. You will see a screen similar to the "Summary Reports Screenshot" below.
- III. Click on the  View Icon beside any report to see more information regarding the filed report.
- IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▼) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
- V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
- VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.

Individual Reports Screenshot









Summary

Summary Reports Accepted Summary Reports Pending Summary Reports Advanced Search


Status Keywords Apply Search

Items 1-20 of 53

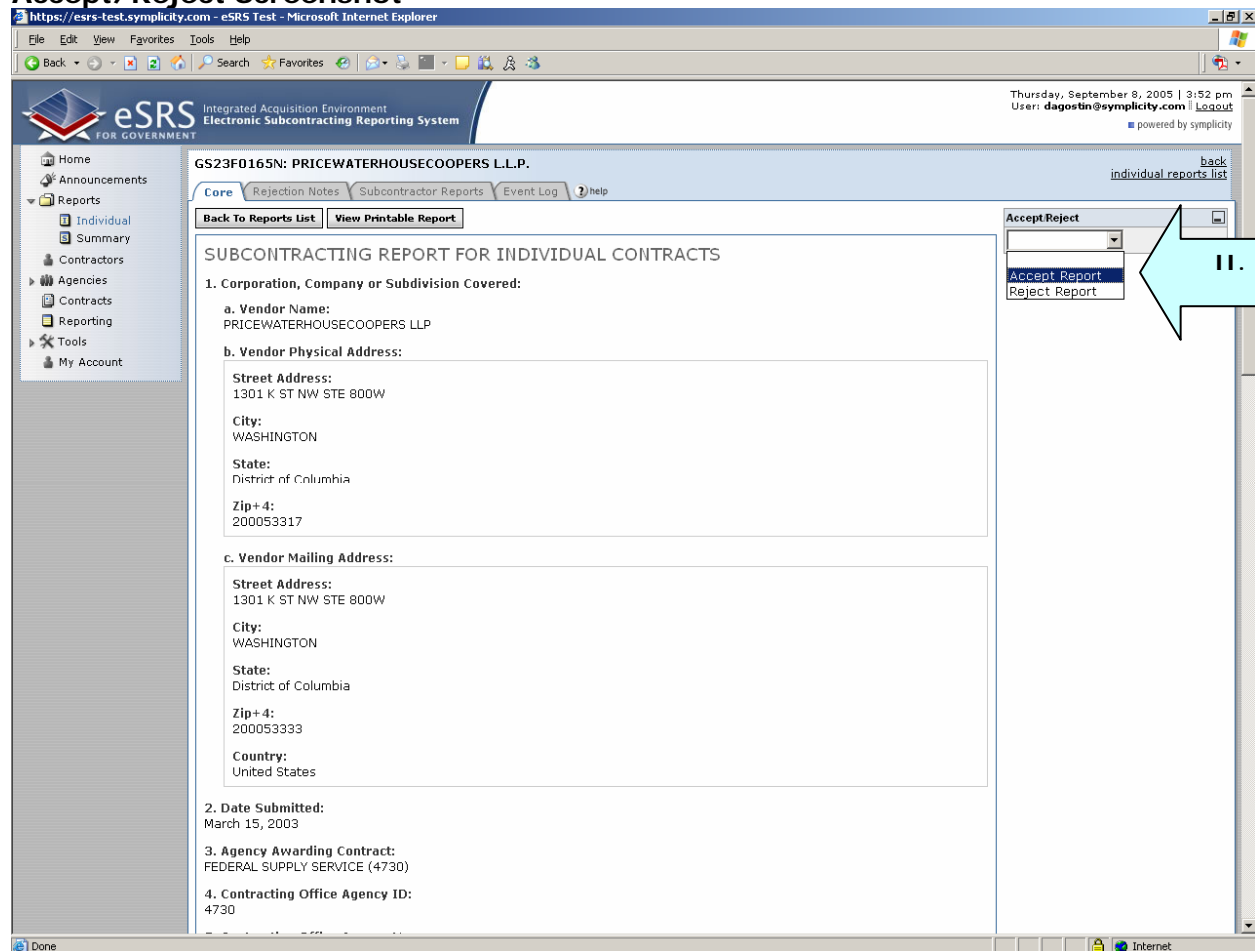
Contractor ▼	Status	Agency	Report Period ▼	Report Year ▼
 4 SURE.COM INC	DRT	GENERAL SERVICES ADMINISTRATION (4700)	Oct 1 - Sept 30	2003
 4 SURE.COM INC	REJ	GENERAL SERVICES ADMINISTRATION (4700)	Oct 1 - Sept 30	2004
 AAI CORPORATION	PEN	FEDERAL HIGHWAY ADMINISTRATION (6925)	Oct 1 - Mar 31	2005
 ACCENTURE LLP	ACC - July 26, 2005 11:38 am	FEDERAL SUPPLY SERVICE (4730)	Oct 1 - Sept 30	2003
 ACCENTURE LLP	ACC - July 27, 2005 9:57 am	GENERAL SERVICES ADMINISTRATION (4700)	Oct 1 - Sept 30	2004
 ACTERNA LLC	ACC - August 24, 2005 12:04 pm	GENERAL SERVICES ADMINISTRATION (4700)	Oct 1 - Mar 31	2005

4.3 Accept / Reject

The processes to accept or reject individual and summary reports are the same. To accept or reject, simply go to the section (Individual or Summary) that the report is filed. Click on the "Pending" tab near the top of the screen, and find the report that you would like to accept or reject.

- I. Click on the  View Icon beside the report.
- II. Select "Accept Report" or "Reject Report" from the drop down box (See "Accept/Reject Screenshot" below).
- III. If you accepted the report, you may return to the report list by clicking on the "Back to Reports List" button.
- IV. If you clicked "Reject Report" you will be redirected to a page with a form. Please fill this form out with information why the report was rejected. After completing the form, click "Submit" to finalize the rejection.


Accept/Reject Screenshot



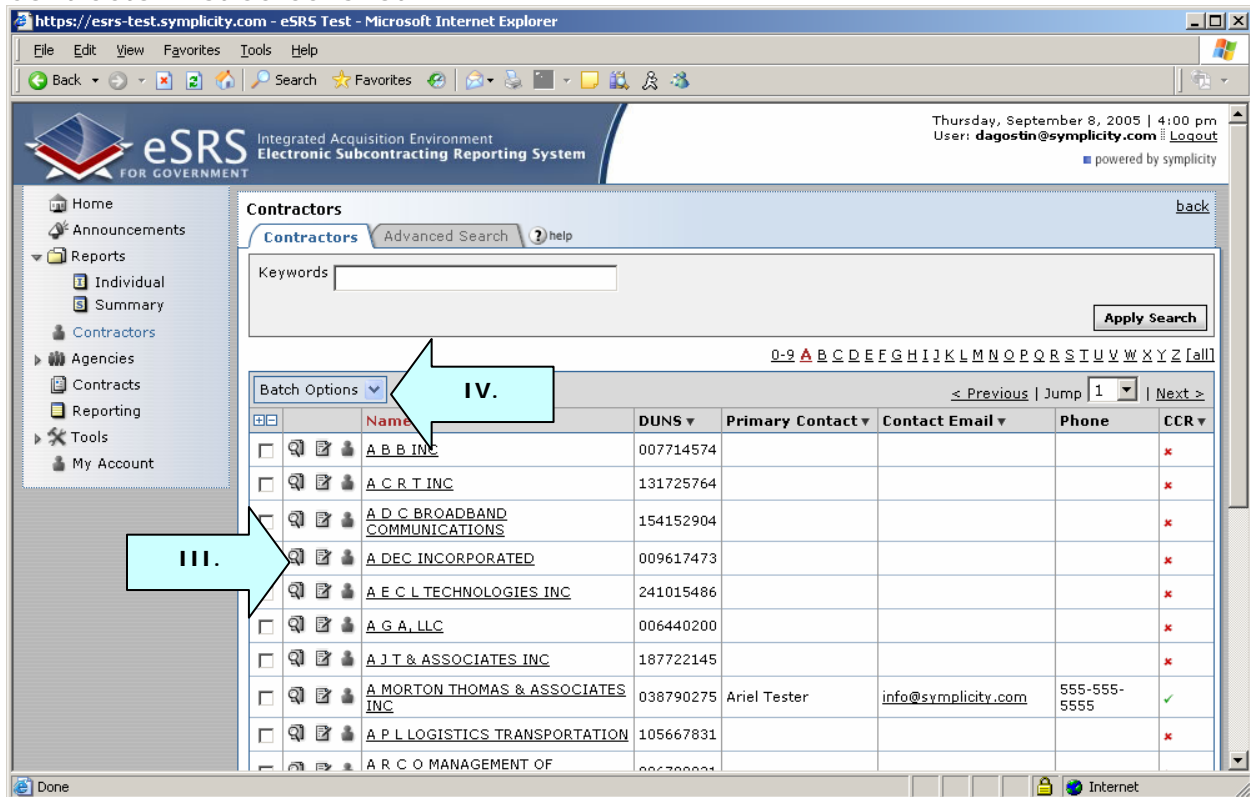
The screenshot shows the eSRS web application interface. The main content area displays a "SUBCONTRACTING REPORT FOR INDIVIDUAL CONTRACTS" for vendor GS23F0165N: PRICEWATERHOUSECOOPERS L.L.P. The report includes fields for Vendor Name, Vendor Physical Address, and Vendor Mailing Address. On the right side, there is a dropdown menu labeled "Accept/Reject" with options "Accept Report" and "Reject Report". A red arrow points to the "Accept Report" option, labeled "II.".

5. Contractors

5.1 Review / View Existing

- I. Click on "Contractors" on the left hand navigation menu.
- II. You will see a screen similar to the "Contractor List Screenshot" below.
- III. Click on the  View Icon beside any contractor to see more information regarding the specific contractor.
- IV. You may send a batch e-mail by clicking the check-box beside the contractors you wish to e-mail, and then clicking on the "Batch Options" drop down.

Contractor List Screenshot



The screenshot displays the eSRS (Electronic Subcontracting Reporting System) interface for viewing contractors. The browser window shows the URL <https://esrs-test.simplicity.com>. The page title is "eSRS Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "dagostin@simplicity.com" on Thursday, September 8, 2005, at 4:00 pm.

The left navigation menu includes: Home, Announcements, Reports (Individual, Summary), Contractors, Agencies, Contracts, Reporting, Tools, and My Account. The "Contractors" link is selected.

The main content area is titled "Contractors" and includes a search bar with a "Keywords" field and an "Apply Search" button. Below the search bar is a "Batch Options" dropdown menu. The contractor list is displayed with the following columns: Name, DUNS, Primary Contact, Contact Email, Phone, and CCR. The list includes contractors such as A B B INC, A C R T INC, A D C BROADBAND COMMUNICATIONS, A DEC INCORPORATED, A E C L TECHNOLOGIES INC, A G A, LLC, A J T & ASSOCIATES INC, A MORTON THOMAS & ASSOCIATES INC, A P L LOGISTICS TRANSPORTATION, and A R C O MANAGEMENT OF.

Callout III points to the "View Icon" (a magnifying glass) next to the contractor entry "A DEC INCORPORATED". Callout IV points to the "Batch Options" dropdown menu.

	Name	DUNS	Primary Contact	Contact Email	Phone	CCR
<input type="checkbox"/>	A B B INC	007714574				*
<input type="checkbox"/>	A C R T INC	131725764				*
<input type="checkbox"/>	A D C BROADBAND COMMUNICATIONS	154152904				*
<input type="checkbox"/>	A DEC INCORPORATED	009617473				*
<input type="checkbox"/>	A E C L TECHNOLOGIES INC	241015486				*
<input type="checkbox"/>	A G A, LLC	006440200				*
<input type="checkbox"/>	A J T & ASSOCIATES INC	187722145				*
<input type="checkbox"/>	A MORTON THOMAS & ASSOCIATES INC	038790275	Ariel Tester	info@simplicity.com	555-555-5555	✓
<input type="checkbox"/>	A P L LOGISTICS TRANSPORTATION	105667831				*
<input type="checkbox"/>	A R C O MANAGEMENT OF	006700000				*

5.2 Add New Contractor

- I. Click on "Contractors" on the left hand navigation menu.
- II. Click on the "Add New" button near the bottom of the screen.
- III. You should now see a screen similar to the "Add new Contractor Screenshot" below.
- IV. Populate the fields.
- V. Click "Submit" when you are finished.

Add New Contractor Screenshot

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Home Announcements Reports Individual Summary Contractors Agencies Contracts Reporting Tools My Account

[New Contractor] [back](#) [contractors list](#)

Core ? help

Submit Save Cancel Cancel Edits Delete

Contractor Information * indicates a required field

DUNS #*:

Name*:

Doing Business As (DBA)*:

Cage #:

Division Name:

Division Number:

Physical Address:



Street Address*:

City*:

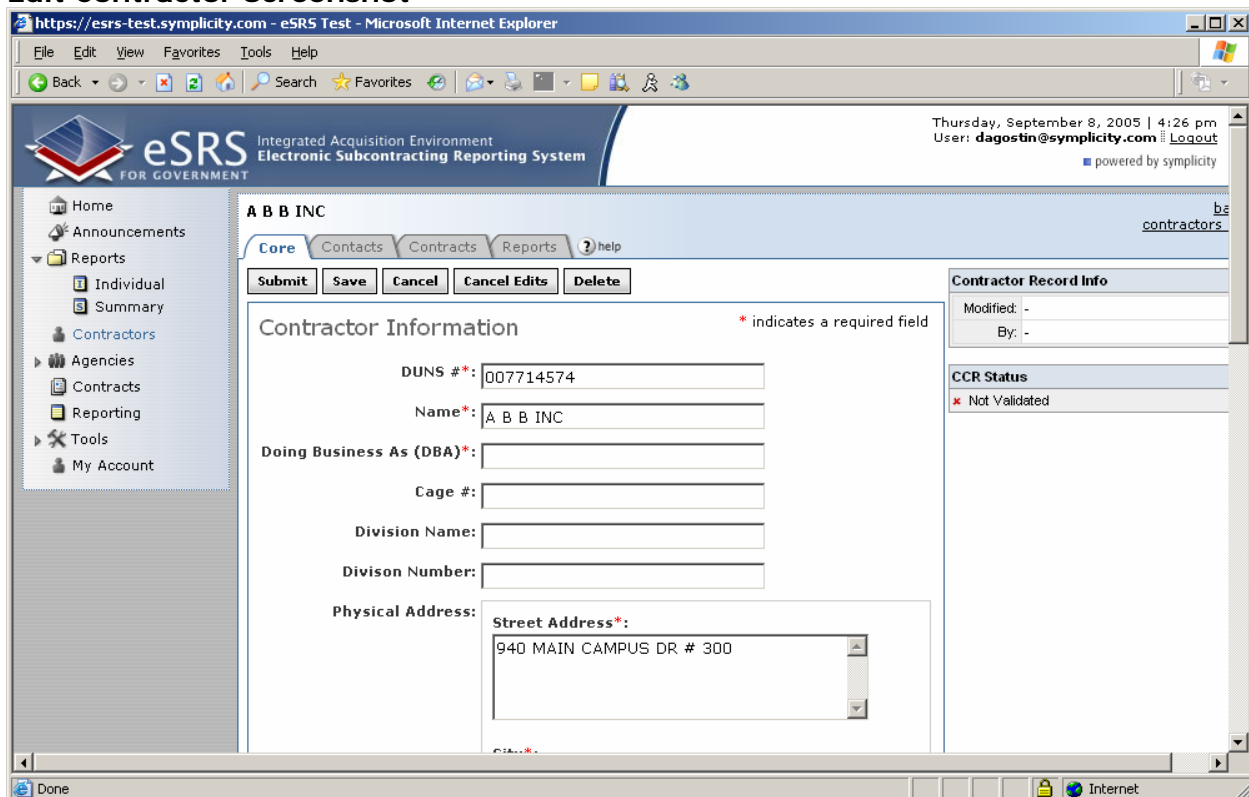
State*:

Done Internet

5.3 Edit Contractors

- I. Click on "Contractors" on the left hand navigation menu.
- II. Click on the Edit Icon  beside any contractor to edit the contractor.
- III. You may also click on the  View Icon, and then click on the "Edit" button to edit a contractor. (You should see a screen similar to the "Edit Contractor Screenshot" below.)
- IV. Edit the fields that you wish to change.
- V. Click "Submit" to save the changes and return back to the contractor list.

Edit Contractor Screenshot



The screenshot shows a web browser window with the URL <https://esrs-test.simplicity.com>. The page title is "eSRS Test - Microsoft Internet Explorer". The browser's address bar shows the URL. The page header includes the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "dagostin@simplicity.com" and the date is "Thursday, September 8, 2005 | 4:26 pm".

The left navigation menu includes links to Home, Announcements, Reports (Individual, Summary), Contractors, Agencies, Contracts, Reporting, Tools, and My Account. The "Contractors" link is selected.

The main content area displays the "Contractor Information" form for "A B B INC". The form includes the following fields:



- DUNS #: 007714574
- Name*: A B B INC
- Doing Business As (DBA)*:
- Cage #:
- Division Name:
- Division Number:
- Physical Address:
 - Street Address*: 940 MAIN CAMPUS DR # 300

The form also includes a "Contractor Record Info" section with "Modified: -" and "By: -". The "CCR Status" section shows "Not Validated".

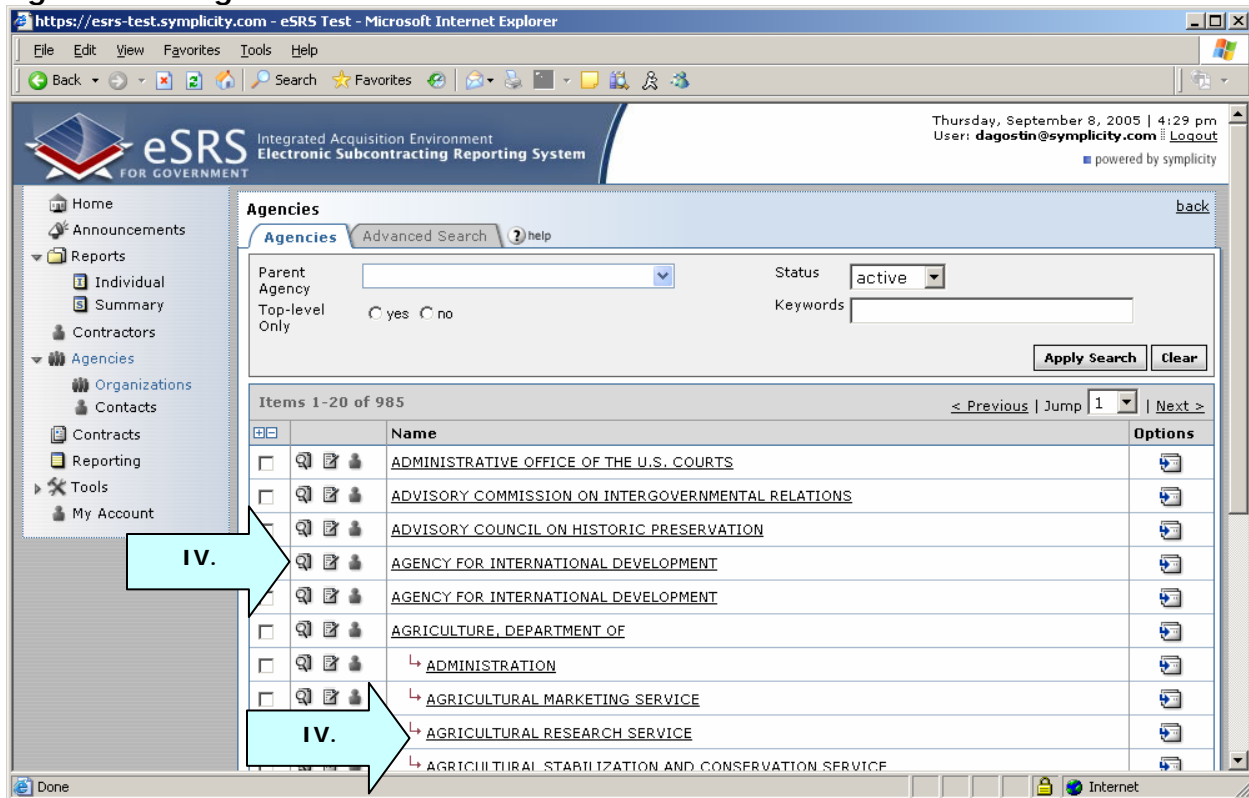
At the bottom of the form, there are buttons for "Submit", "Save", "Cancel", "Cancel Edits", and "Delete".

6. Agencies (Organizations)

6.1 Review / View Existing

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" on the left hand menu.
- III. You will see a screen similar to the "Agencies / Organizations Screenshot" below.
- IV. Click on the  View Icon beside any contractor to see more information pertaining to that specific contractor.
- V. Notice that any child organization will appear below the parent organization and will also have a  to the left of the name.

Agencies / Organizations Screenshot



The screenshot shows the eSRS web application interface. The left navigation menu includes links for Home, Announcements, Reports (Individual, Summary), Contractors, Agencies, Organizations, Contacts, Contracts, Reporting, Tools, and My Account. The main content area is titled "Agencies" and includes a search bar with fields for Parent Agency, Status (active), and Keywords. Below the search bar is a table of agencies with columns for Name and Options. The table lists various agencies, including the ADMINISTRATIVE OFFICE OF THE U.S. COURTS, ADVISORY COMMISSION ON INTERGOVERNMENTAL RELATIONS, and AGRICULTURE, DEPARTMENT OF. Two blue arrows labeled "IV." point to the "View" icons in the Options column of the table.

Items 1-20 of 985	Name	Options
<input type="checkbox"/>	ADMINISTRATIVE OFFICE OF THE U.S. COURTS	
<input type="checkbox"/>	ADVISORY COMMISSION ON INTERGOVERNMENTAL RELATIONS	
<input type="checkbox"/>	ADVISORY COUNCIL ON HISTORIC PRESERVATION	
<input type="checkbox"/>	AGENCY FOR INTERNATIONAL DEVELOPMENT	
<input type="checkbox"/>	AGENCY FOR INTERNATIONAL DEVELOPMENT	
<input type="checkbox"/>	AGRICULTURE, DEPARTMENT OF	
<input type="checkbox"/>	ADMINISTRATION	
<input type="checkbox"/>	AGRICULTURAL MARKETING SERVICE	
<input type="checkbox"/>	AGRICULTURAL RESEARCH SERVICE	
<input type="checkbox"/>	AGRICULTURAL STABILIZATION AND CONSERVATION SERVICE	

6.2 Add New Agency

- I. Click on "Agencies" then "Organizations" on the left hand navigation menu.
- II. Click on the "Add New" button near the bottom of the screen.
- III. You should now see a screen similar to the "Add New Contractor Screenshot" below.
- IV. Populate the fields.
- V. Click "Submit" when you are finished.

Add New Contractor Screenshot

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites

Thursday, September 8, 2005 | 4:34 pm
User: [dagostin@simplicity.com](#) | [Logout](#)
powered by simplicity

eSRS Integrated Acquisition Environment
FOR GOVERNMENT Electronic Subcontracting Reporting System

Home
Announcements
Reports
Individual
Summary
Contractors
Agencies
Organizations
Contacts
Contracts
Reporting
Tools
My Account

[New Agency] [back](#) [agencies list](#)

Core ? help

Submit Save Cancel Cancel Edits Delete

Agency Information * indicates a required field

Agency:

Name*:

Shortname:

Code*:

Agency Address:


Street Address:

City:

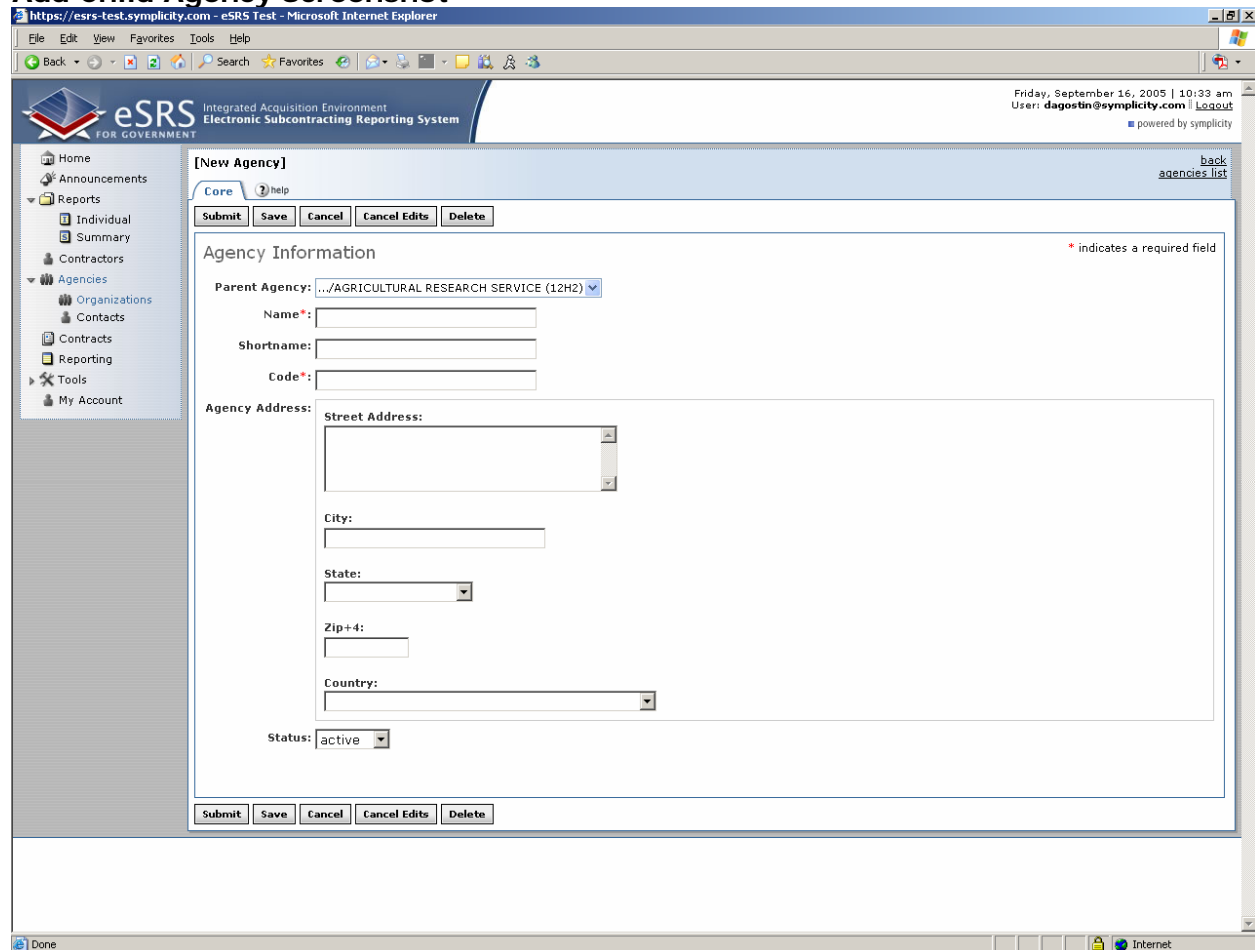
State:

Done Internet


6.3 Add New Child Agency

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" under Agencies.
- III. Click on the  Add New Child button next to the parent agency.
- IV. You should now see a screen similar to the "Add Child Agency Screenshot" below.
- V. Populate the fields.
- VI. Click "Submit" when you are finished.



Add Child Agency Screenshot



6.4 Edit Organization


- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" under Agencies on the left hand navigation menu.
- III. Click on the Edit Icon  beside any organization to edit.
- IV. Edit the fields that you wish to change.
- V. Click "Submit" to save the changes and return back to the contractor list.

6.5 Contacts

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" under Agencies.
- III. Click on the  Contacts button next to the agency.
- IV. The Contacts for this agency will appear.
- V. You can set a contact as the primary contact by clicking on the "Set Primary" button.
- VI. You may also edit a contact by clicking on the Edit Icon  beside the contact you wish to edit.
- VII. Finally, to send an e-mail to the contacts, put a checkmark beside the contacts you wish to e-mail. Use the "Batch Options" drop down to send an e-mail.
- VIII. For more information, please read Section 7, Contacts.

7. Agencies (Contacts)

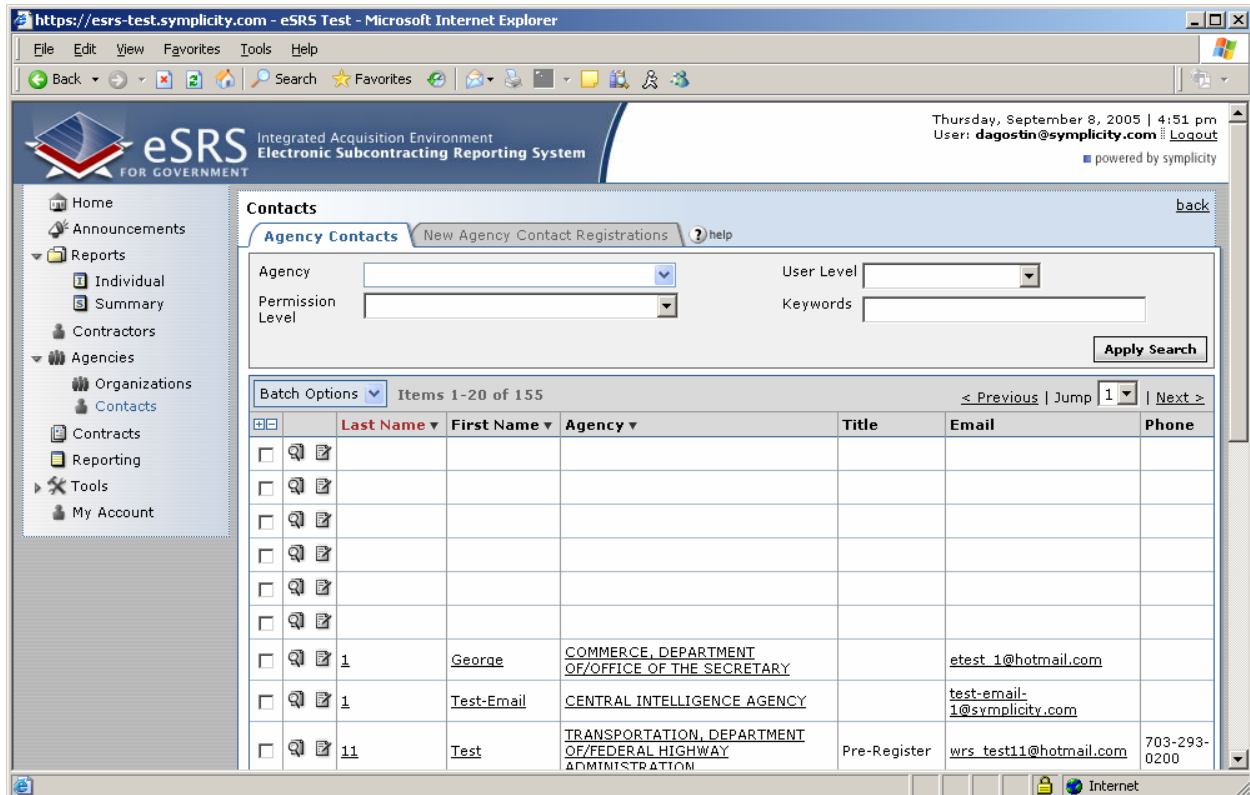
7.1 Review / View Existing

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Contacts" underneath Agencies.
- III. You will see a screen similar to the "Contacts Screenshot" below.
- IV. Click on the  View Icon beside the contact you wish to view.

7.2 Add New Contact

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Contacts" underneath Agencies.
- III. Click the "Add New" button near the bottom of the screen.
- IV. Select the Agency that the contact should be associated with.
- V. Populate the form.
- VI. Click "Submit"

Contacts Screenshot



https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites

Thursday, September 8, 2005 | 4:51 pm
User: dagostin@simplicity.com | Logout
powered by simplicity

eSRS Integrated Acquisition Environment
Electronic Subcontracting Reporting System

Home
Announcements
Reports
Individual
Summary
Contractors
Agencies
Organizations
Contacts
Contracts
Reporting
Tools
My Account


Contacts [New Agency Contact Registrations](#) [? help](#) [back](#)

Agency User Level
Permission Level Keywords

Batch Options < Previous | Jump 1 | Next >




	Last Name	First Name	Agency	Title	Email	Phone
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>	1	George	COMMERCE, DEPARTMENT OF/OFFICE OF THE SECRETARY		etest_1@hotmail.com	
<input type="checkbox"/>	1	Test-Email	CENTRAL INTELLIGENCE AGENCY		test-email-1@simplicity.com	
<input type="checkbox"/>	11	Test	TRANSPORTATION, DEPARTMENT OF/FEDERAL HIGHWAY ADMINISTRATION	Pre-Register	wrs_test11@hotmail.com	703-293-0200

7.3 Edit Contact

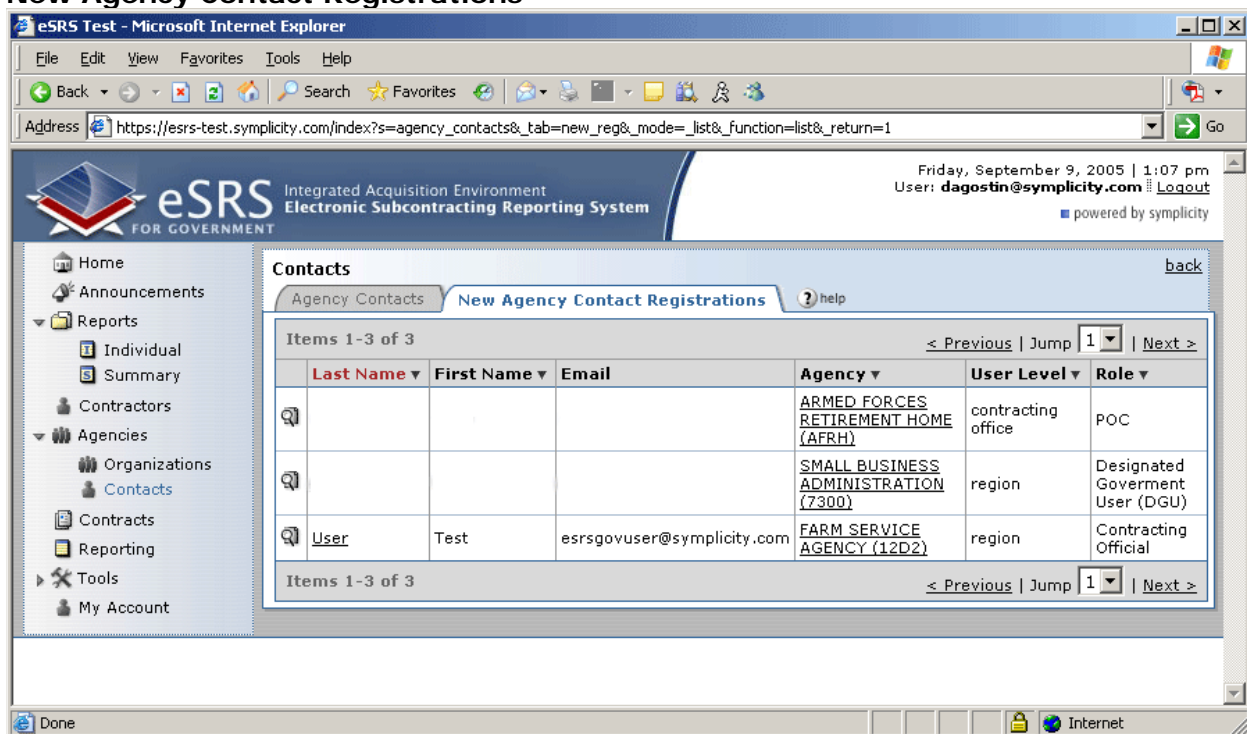
- VI. Click on "Agencies" on the left hand navigation menu.
- VII. Click on "Contacts" under Agencies.
- VIII. Click on the Edit Icon  beside the contact you wish to edit.
- IX. Edit the fields that you wish to change.
- X. Click "Submit" to save the changes and return back to the contractor list.

7.4 Approve/Reject Agency Contact Registration

Agency Contact registrations must first be approved before the user can begin using the ESRS system.

- I. On the "Home" page, New Contact Registrations will appear under "Pending Actions" if contacts need approved.
- II. Click on the "New Agency Contact Registrations" link.
- III. You may also click on Agencies and then Contacts on the left hand navigation menu. After clicking on Contacts, Click on the "New Agency Contact Registrations" tab to go to the same place that the Home Page link directs you.
- IV. Click on the  View Icon beside the contact you wish to approve or reject.
- V. Click on  or  to complete the process.

New Agency Contact Registrations



eSRS Test - Microsoft Internet Explorer

Address: https://esrs-test.simplicity.com/index?s=agency_contacts&_tab=new_reg&_mode=_list&_function=list&_return=1




Friday, September 9, 2005 | 1:07 pm
User: [dagostin@simplicity.com](#) | [Logout](#)
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eSRS FOR GOVERNMENT
Integrated Acquisition Environment
Electronic Subcontracting Reporting System

Contacts [back](#)

Agency Contacts **New Agency Contact Registrations** [help](#)

Items 1-3 of 3 < Previous | Jump 1 | Next >

	Last Name ▼	First Name ▼	Email	Agency ▼	User Level ▼	Role ▼
				ARMED FORCES RETIREMENT HOME (AFRH)	contracting office	POC
				SMALL BUSINESS ADMINISTRATION (7300)	region	Designated Government User (DGU)
	User	Test	esrsgovuser@simplicity.com	FARM SERVICE AGENCY (12D2)	region	Contracting Official


Items 1-3 of 3 < Previous | Jump 1 | Next >

Done Internet

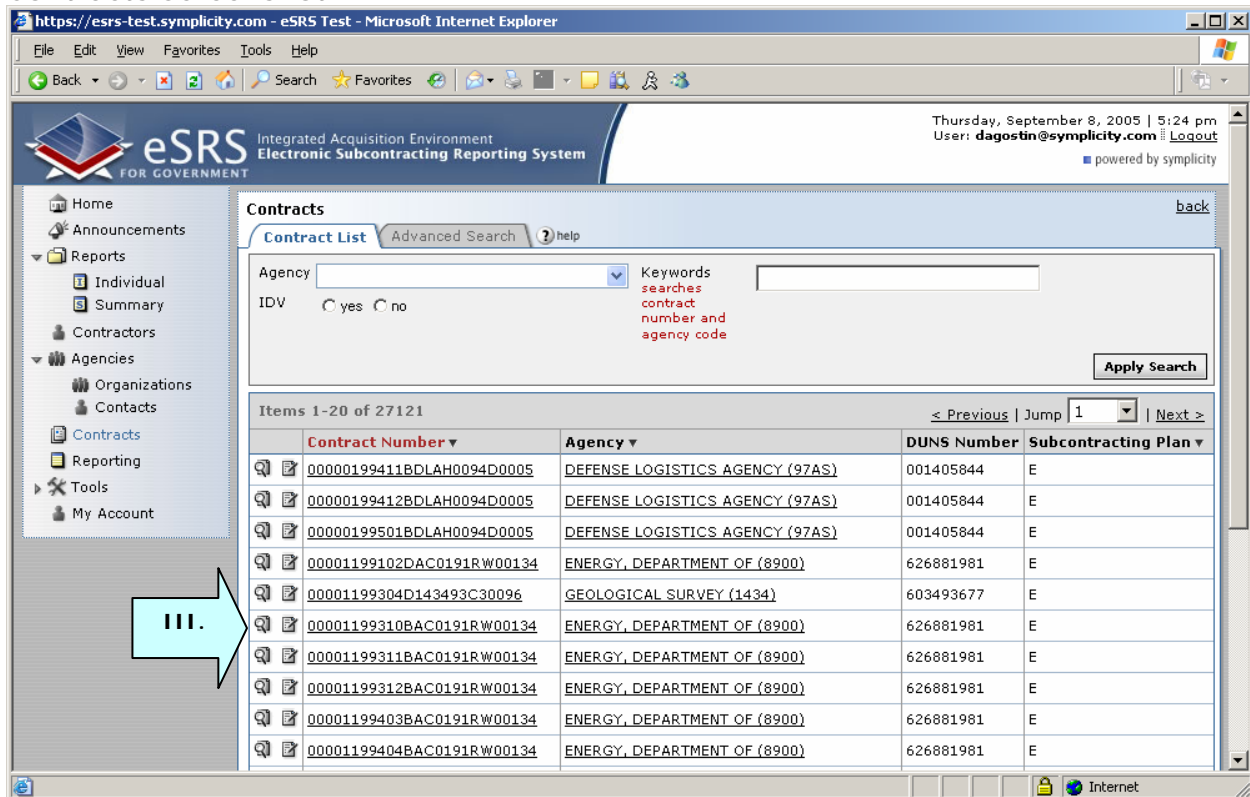
8. Contracts

Contracts will be updated nightly from CCR.

8.1 Review / View Existing

- I. Click on "Contracts" on the left hand navigation menu.
- II. You will see a screen similar to the "Contracts Screenshot" below.
- III. Click on the  View Icon beside the contract you wish to view. You may also click on the contract number.

Contracts Screenshot



https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Thursday, September 8, 2005 | 5:24 pm
User: [dagostin@simplicity.com](#) | [Logout](#)
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eSRS Integrated Acquisition Environment
Electronic Subcontracting Reporting System

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▼ Agencies
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Tools
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Contracts [Contract List](#) [Advanced Search](#) [? help](#) [back](#)

Agency Keywords
IDV ☐ yes ☐ no searches contract number and agency code


[Apply Search](#)

Items 1-20 of 27121 < Previous | Jump 1 | Next >

	Contract Number ▼	Agency ▼	DUNS Number	Subcontracting Plan ▼
	00000199411BDLAH0094D0005	DEFENSE LOGISTICS AGENCY (97AS)	001405844	E
	00000199412BDLAH0094D0005	DEFENSE LOGISTICS AGENCY (97AS)	001405844	E
	00000199501BDLAH0094D0005	DEFENSE LOGISTICS AGENCY (97AS)	001405844	E
	00001199102DAC0191RW00134	ENERGY, DEPARTMENT OF (8900)	626881981	E
	00001199304D143493C30096	GEOLOGICAL SURVEY (1434)	603493677	E
	00001199310BAC0191RW00134	ENERGY, DEPARTMENT OF (8900)	626881981	E
	00001199311BAC0191RW00134	ENERGY, DEPARTMENT OF (8900)	626881981	E
	00001199312BAC0191RW00134	ENERGY, DEPARTMENT OF (8900)	626881981	E
	00001199403BAC0191RW00134	ENERGY, DEPARTMENT OF (8900)	626881981	E
	00001199404BAC0191RW00134	ENERGY, DEPARTMENT OF (8900)	626881981	E

Internet

8.2 Edit Contract

- I. Click on "Contracts" on the left hand navigation menu.
- II. Click on the Edit Icon  beside the contact you wish to edit.
- III. Edit the fields that you wish to change.
- IV. Click "Submit" to save the changes and return back to the contractor list.

8.3 Add New Contact

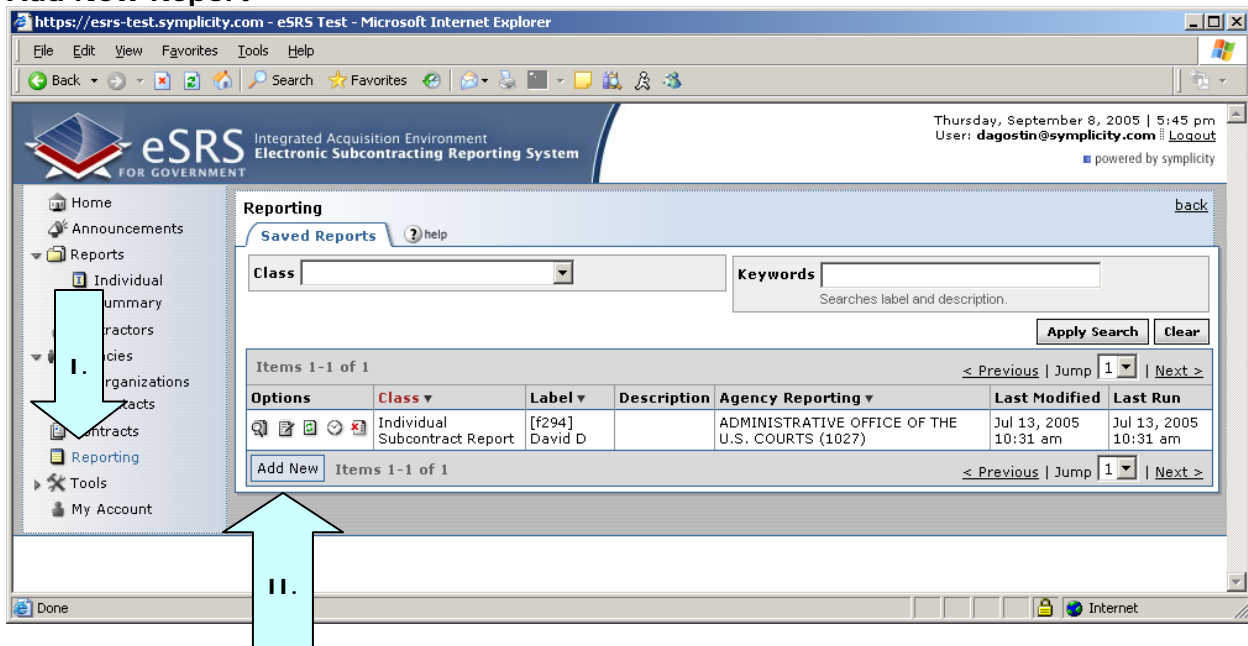
- I. Click on "Contracts" on the left hand navigation menu.
- II. Click the "Add New" button near the bottom of the screen.
- III. Populate the form.
- IV. Click "Submit"

9. Reporting

9.1 Build New Reports

- I. Create a new report by clicking on "Reporting" on the left navigation menu.
- II. Click on the "Add New" button.

Add New Report



- III. Select the basis for your report.
- IV. Click Continue
- V. Before building the report, checkmark the Save As box and input a Name and Description for the Report.
- VI. When updating an existing report, save the report under a different name by check-marking Copy to New Report.
- VII. Select the fields to be included in the report by check-marking specific fields.
- VIII. Narrow the focus of the report by clicking on a Filter link under a particular field.
- IX. Once fields and filters have been assigned, view the report by clicking Submit at the bottom of the page. **NOTE:** Save & return will save change to report builder, but will not run report in order to view it.

Build a New Report Screenshot

The screenshot displays the eSRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) web application. The browser window shows the URL <https://esrs-test.simplicity.com> and the user is logged in as **dagostin@simplicity.com**. The interface includes a navigation menu on the left with options like Home, Announcements, Reports, Individual, Summary, Contractors, Agencies, Organizations, Contacts, Contracts, Reporting, Tools, and My Account. The 'Reporting' section is active, showing a yellow informational box and a form for creating a report. The form includes fields for 'Save as:' (with value '[f294] David D'), 'Description:', and a checkbox for 'Copy to new report'. Below this is a section titled 'Step 2: Please select the fields and filters you wish to have included in your report.' with a table of fields and checkboxes. The 'Base Class' is set to 'Individual Subcontract Report'. The table lists various fields with checkboxes: Contract (checked), Report Submitted As (unchecked), Vendor Name (checked), Vendor Physical Address (unchecked), Vendor Mailing Address (unchecked), Date Submitted (unchecked), Agency Awarding Contract (checked), Contracting Office Agency ID (unchecked), Contracting Office Agency Name (unchecked), Region Code (unchecked), Contracting Office ID (unchecked), Contracting Office Name (unchecked), Funding Agency ID (unchecked), Funding Agency Name (unchecked), and Funding Office ID (unchecked). Annotations V, VI, VII., and VIII. point to specific elements: V points to the 'Reporting' tab, VI points to the 'Reporting' link in the navigation menu, VII., VIII. points to the 'Contract' checkbox in the field selection list.

Reporting

Previous Versions Settings ? help

Reports will pull from **accepted** Individual Subcontracting Reports from your agency and below. If you would like to filter specific agency/agencies, scroll down to the Contract Related class and choose from the agencies in the select list. If only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their lower-tiers. To limit the results to a specific reporting period, use the "Reporting Period From Inception Of Contract Thru:" filters.

Save as: [f294] David D

Description:


☐ Copy to new report

Step 2: Please select the fields and filters you wish to have included in your report.

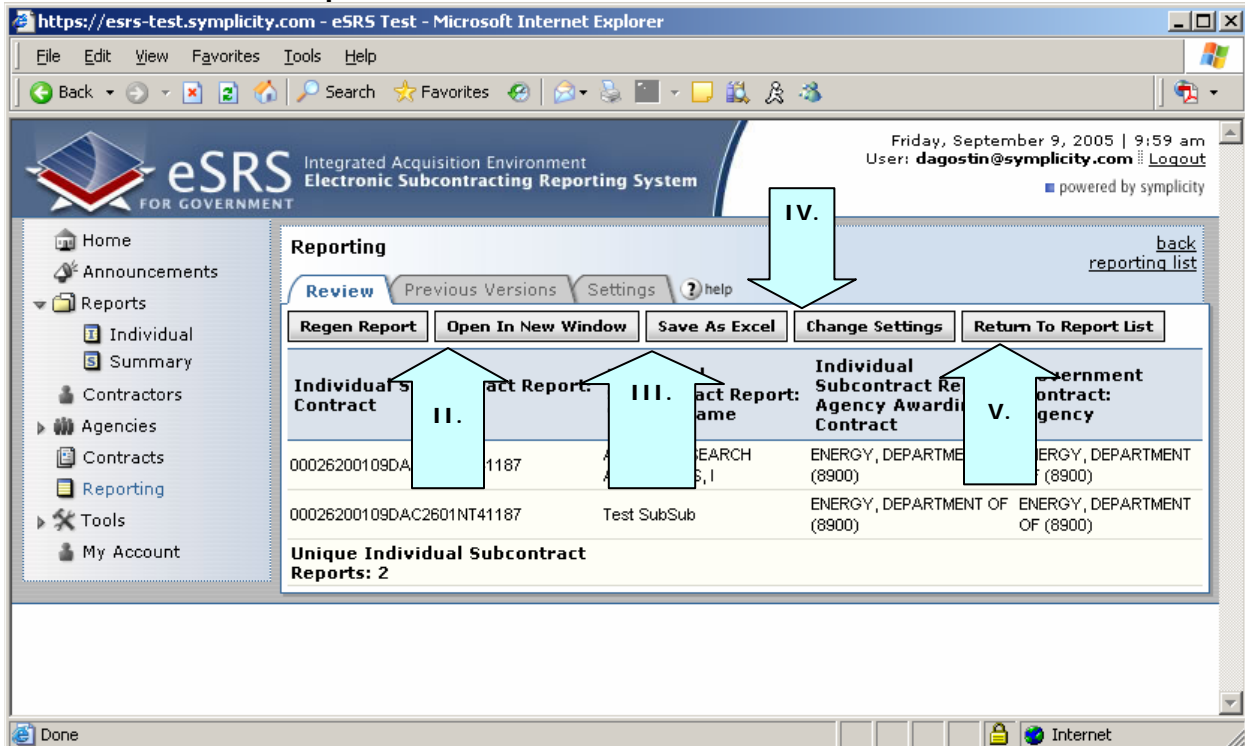
Base Class: Individual Subcontract Report Count ☒

<input checked="" type="checkbox"/> Contract	
<input type="checkbox"/> Report Submitted As	
<input type="checkbox"/> Vendor Name	
<input type="checkbox"/> Vendor Physical Address	
<input type="checkbox"/> Vendor Mailing Address	
<input type="checkbox"/> Date Submitted	
<input checked="" type="checkbox"/> Agency Awarding Contract	
<input type="checkbox"/> Contracting Office Agency ID	
<input type="checkbox"/> Contracting Office Agency Name	
<input type="checkbox"/> Region Code	
<input type="checkbox"/> Contracting Office ID	
<input type="checkbox"/> Contracting Office Name	
<input type="checkbox"/> Funding Agency ID	
<input type="checkbox"/> Funding Agency Name	
<input type="checkbox"/> Funding Office ID	

9.2 View Generated Report

- I. Click on the  View Icon beside an existing report.
- II. Show the report in a separate browser by clicking on the "Open in New Window" button near the top of the screen.
- III. Transfer the report into an Excel Workbook by clicking the Save as Excel button.
- IV. Re-configure the report by clicking on Change Settings button near the top of the screen.
- V. Go back to the report list by clicking the "Return to Report List" button.

Review Generated Report



The screenshot shows the eSRS web application interface. The browser window title is "https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer". The page header includes the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "dagostin@simplicity.com" on Friday, September 9, 2005, at 9:59 am. The page is powered by simplicity.

The main content area is titled "Reporting" and contains several tabs: "Review", "Previous Versions", "Settings", and "? help". Below the tabs are five buttons: "Regen Report", "Open In New Window", "Save As Excel", "Change Settings", and "Return To Report List".





Below the buttons is a table of reports. The table has columns for "Contract", "Report Name", and "Agency Awarding Contract". The table contains two rows of data. The first row shows a contract with ID "00026200109DA" and a report named "RESEARCH". The second row shows a contract with ID "00026200109DAC2601NT41187" and a report named "Test SubSub".

At the bottom of the table, it says "Unique Individual Subcontract Reports: 2".

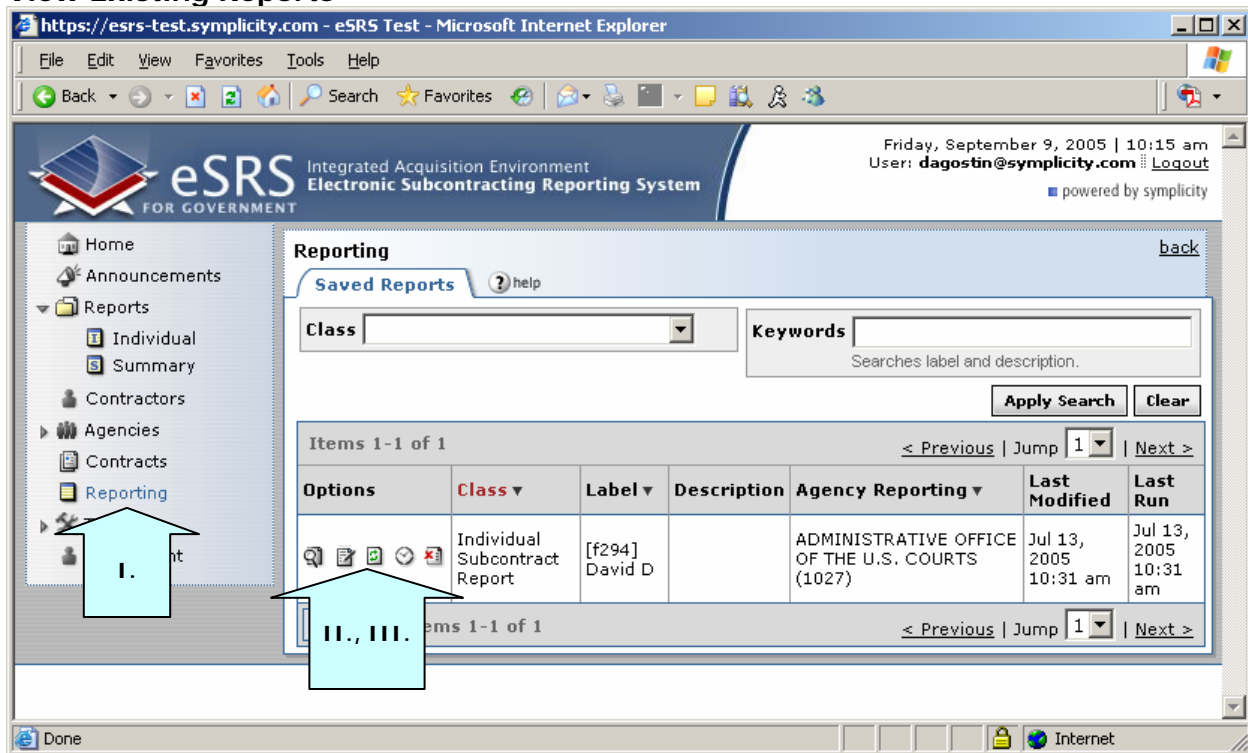
Arrows labeled I through V point to specific UI elements:

- I. Points to the "View" icon (a magnifying glass) next to the "Individual Contract" report.
- II. Points to the "Open In New Window" button.
- III. Points to the "Save As Excel" button.
- IV. Points to the "Change Settings" button.
- V. Points to the "Return To Report List" button.

9.3 View Existing Reports

- I. View Existing Report by clicking on REPORTING on the left navigation menu.
- II. View Saved Queries/Report on the list.
- III. View , Edit , Re-run , View Previous Results  by clicking on respective icons.

View Existing Reports



https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Friday, September 9, 2005 | 10:15 am
User: **dagostin@simplicity.com** Logout
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eSRS Integrated Acquisition Environment
FOR GOVERNMENT Electronic Subcontracting Reporting System

Home
Announcements
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Agencies
Contracts
Reporting





Reporting [back](#)

Saved Reports [? help](#)

Class Keywords
Searches label and description.

Apply Search **Clear**

Items 1-1 of 1 < Previous | Jump 1 | Next >

Options	Class	Label	Description	Agency Reporting	Last Modified	Last Run
   	Individual Subcontract Report	[f294] David D		ADMINISTRATIVE OFFICE OF THE U.S. COURTS (1027)	Jul 13, 2005 10:31 am	Jul 13, 2005 10:31 am

Items 1-1 of 1 < Previous | Jump 1 | Next >

Done Internet

10. Tools

10.1 E-mail Manager

System Emails enable administrators to customize the content of emails that are automatically sent by the system.

- I. Review system messages by clicking on the “Email Manager” link on the left hand navigation menu under Tools.
- I. Edit the message content (Message Identifier, Subject, etc) by clicking on a message link in the Label column.
 - Personalize the message by utilizing the Default Fields feature to incorporate mail merge fields into the Message Body.

System Message Screen

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Friday, September 9, 2005 | 10:32 am
User: [dagostin@simplicity.com](#) | [Logout](#)
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eSRS Integrated Acquisition Environment
FOR GOVERNMENT Electronic Subcontracting Reporting System

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 Picklist Manager
 System Settings
 Event Scheduler
 Role Management
Help

Tools [back](#)

System Messages ? help

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Label ▼	Subject ▼	From Address
Contractor Welcome Email	Welcome to eSRS	[__system_steward]
Forgot Password	Password Reset	sheryl.hollins@sba.gov
Gov. Registration Confirmation	eSRS Registration Confirmation	[__system_steward]
Government Codes Not Found	Agency Codes Not Found	[registrant_email]
Government Welcome Email	Welcome to eSRS	[__system_steward]
Individual Subcontract Report Approved	Individual Subcontract Report Approved	[approver]
Individual Subcontract Report Rejected	Individual Subcontract Report Rejected	[rejecter]
Individual Subcontract Report Revised	Individual Subcontract Report Revised	[reporter]
Individual Subcontract Report Submitted (by Prime)	Individual Subcontract Report Submitted	[reporter]

https://esrs-test.simplicity.com/index?s=message_templates

Picklists enable system administrators to manage ESRS dropdowns. Picklists are pre-packaged dropdown menus that administrators may insert into any form on-the-fly.

10.2 Picklist Repository

- I. View a list of pre-prepared system picklists by clicking on the Tools section and then clicking the "Picklist Manager" on the left navigation menu.
- II. Select a picklist category by clicking on a link in the Display Name column.

Picklist List Screen

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Friday, September 9, 2005 | 11:00 am
User: [dagostin@simplicity.com](#) | [Logout](#)
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eSRS Integrated Acquisition Environment
FOR GOVERNMENT Electronic Subcontracting Reporting System

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Picklist Manager [back](#)

Picklist ? help

Items 1-5 of 5 < Previous | Jump 1 | Next >

Display Name	Description	Hierarchical
Contracts: Length	Lists contract lengths	0
Country	Defines the list of countries	0
DCMA Offices	Lists the DCMA offices	0
ONR Offices	Lists the ONR offices	0
States	Defines the list of U.S. states	0

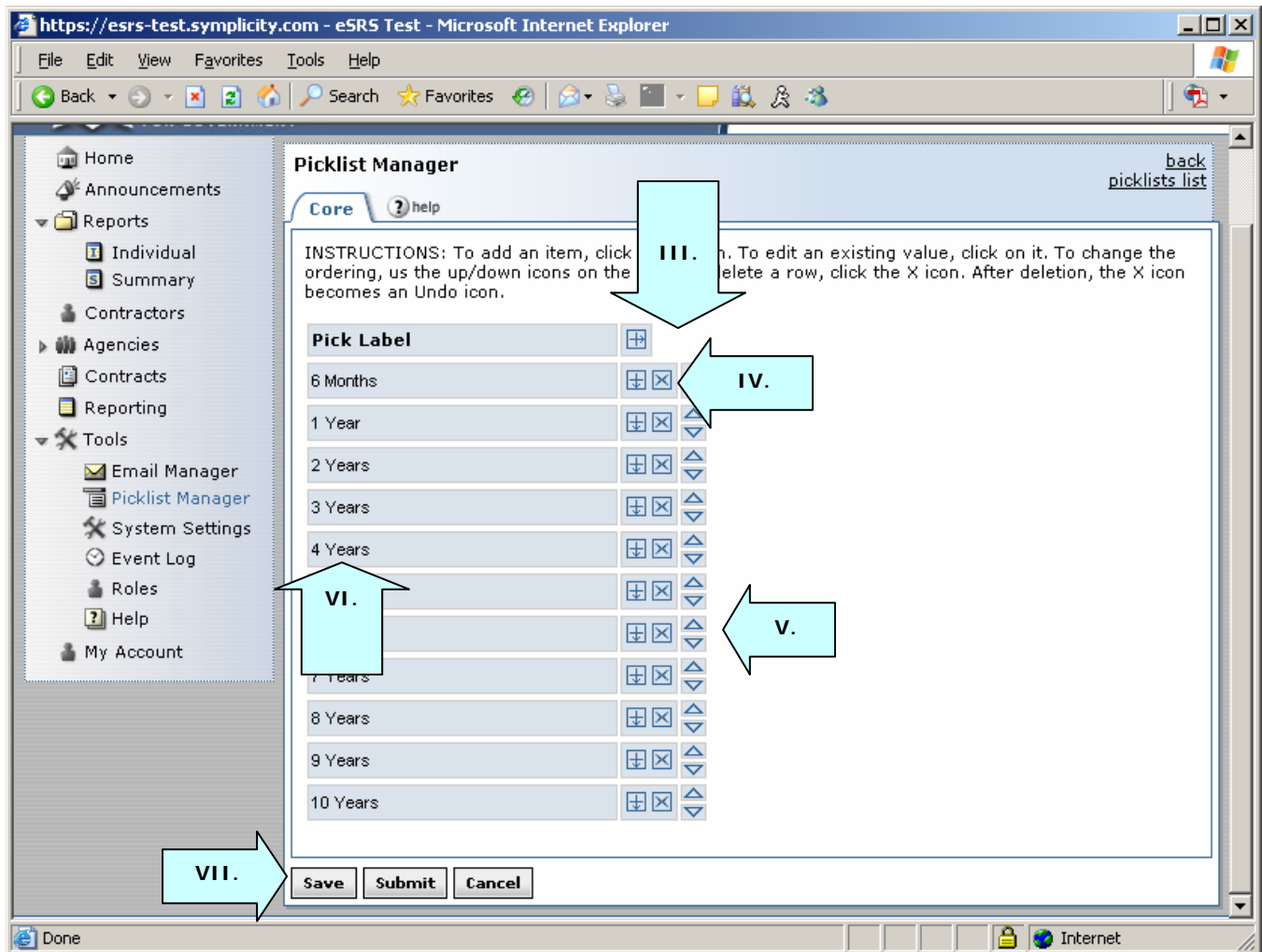
Items 1-5 of 5 < Previous | Jump 1 | Next >

Internet

Edit Picklists

- III. Add an item by clicking on a plus sign next to an existing item with a downward pointing arrow.
- IV. Remove an object from a picklist by clicking on the X.
- V. Change the order of the picklist objects by clicking on the up and down arrows.
- VI. Update the name of an item by clicking on the title and entering a new name.
- VII. When complete, click Save or Submit at the bottom of the screen.

Picklist Edit Screen

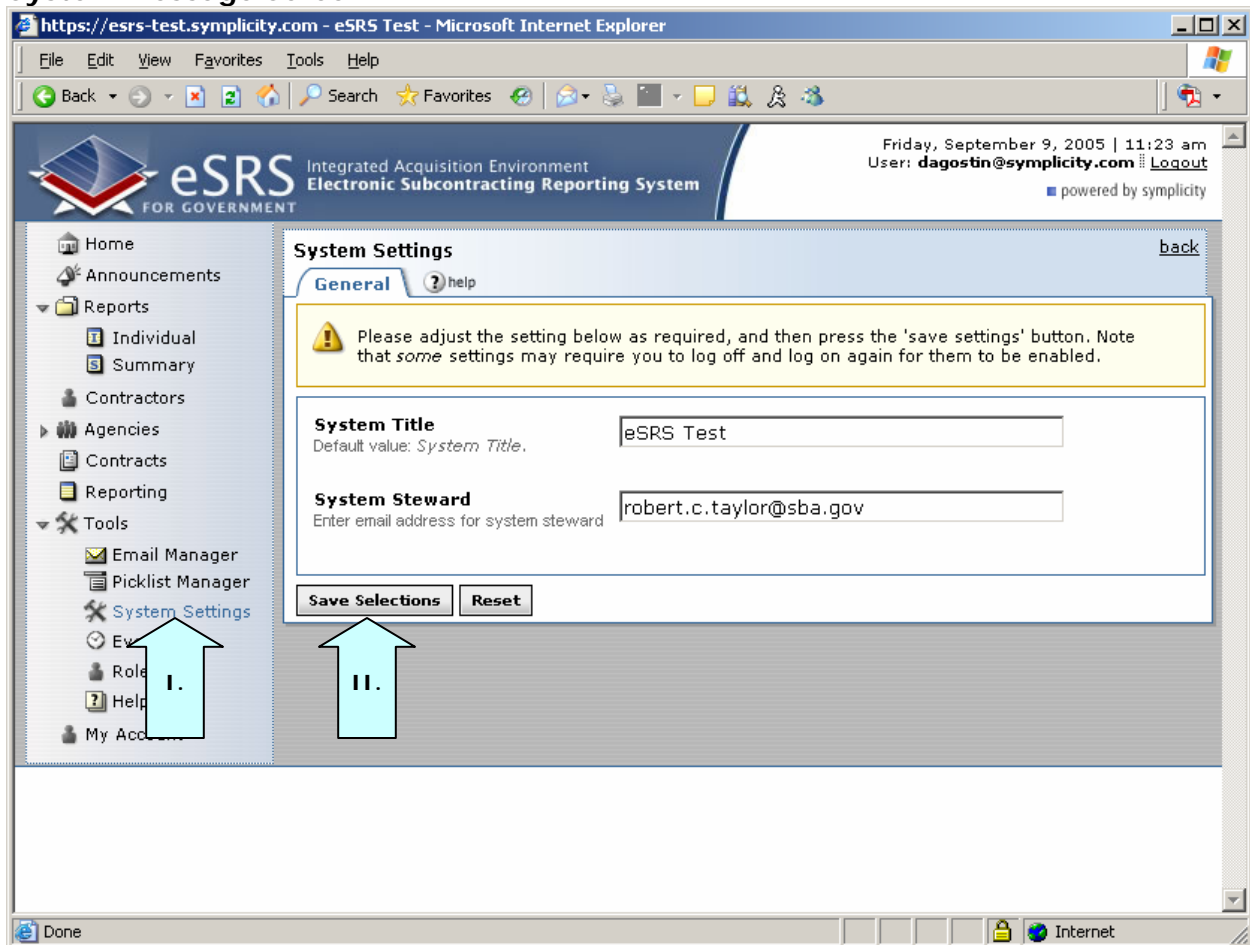


10.3 System Settings

System Settings change system wide parameters that can change the default behavior of the ESRS system and can only be performed as Super users.

- I. Under Tools, Click on System Settings.
- II. After modifying the desired fields, click "Save Selections".

System Message Screen



10.4 Event Log

The Event Log is a repository of all system transactions. System administrators may search the event log to review Logins, objects created, and objects modified. For each event, system administrators may view comprehensive details such as Session ID, Remote IP, etc.

- I. View a list of events by clicking on the TOOLS section and then clicking the EVENT LOG sub-section on the left navigation menu.
- II. Refine the list of ESRS actions to a specific timeframe by utilizing on the date range filter.
- III. Search for a particular event by using keyword filter, user filter (by username), by database ID.
- IV. View comprehensive event details (Internet Protocol, User Agent, etc.) by clicking on a link in the Date column.

Event Log Screen

The screenshot shows the eSRS Event Log interface. The browser address bar displays 'https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer'. The page header includes the eSRS logo and the text 'Integrated Acquisition Environment Electronic Subcontracting Reporting System'. The user is logged in as 'dagostin@simplicity.com' on Friday, September 9, 2005, at 11:25 am. The left navigation menu has 'Event Log' highlighted. The main content area shows the 'Event Log' section with filters for Date Range (2005-09-09), Class filter, Label filter, and Level filter. A search box on the right allows filtering by Description, User type, User, and ID. Below the filters, a table lists 22 items, with the first 20 displayed. The table has columns for Date/Time, Label, Class, Username, User Type, and Lvl. Annotations I, II, III, and IV point to specific elements: I points to the 'Event Log' link in the left menu; II points to the Date Range filter; III points to the search filters on the right; and IV points to a date link in the table.

Event Log

Date Range: 2005-09-09 Select Clear to 2005-09-09 Select Clear

Class filter: [dropdown]

Label filter: [dropdown]

Level filter (=): [all] [dropdown]

Description: [text box]

User type: [dropdown]

User: [text box]

ID: [text box]


Submit Reset

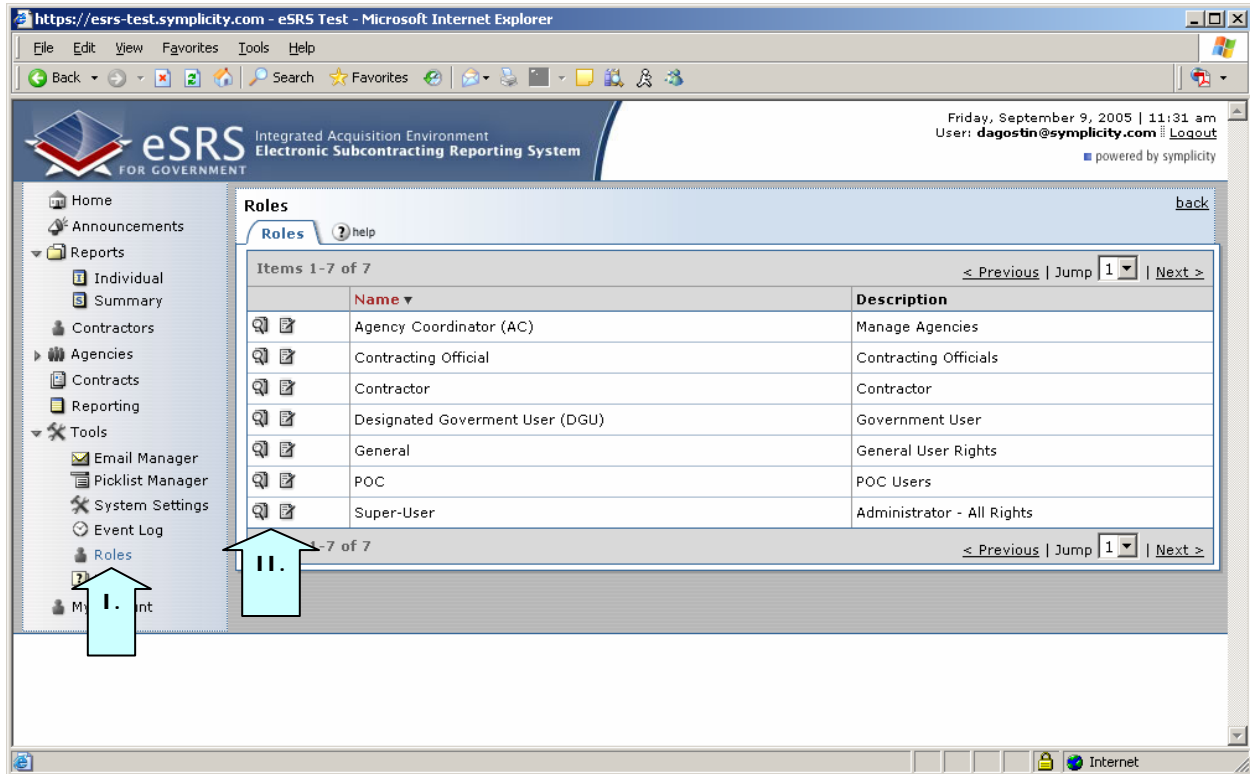
Results limited to 1000 to optimize performance. Please use filters to find desired entries.

Items 1-20 of 22 < Previous | Jump 1 | Next >

Date/Time	Label	Class	Username	User Type	Lvl
Sep 09, 2005 11:14 am	Login		esrs22@yahoo.com	government	2
Sep 09, 2005 10:59 am	ISR Submitted By Prime	f294	esrs11@yahoo.com	contractor	6
Sep 09, 2005 10:59 am	Sent Email		esrs11@yahoo.com	contractor	3
Sep 09, 2005 10:59 am			esrs11@yahoo.com	contractor	3
Sep 09, 2005 10:59 am		f294	esrs11@yahoo.com	contractor	0
Sep 09, 2005 10:56 am		f294	esrs11@yahoo.com	contractor	0
Sep 09, 2005 10:31 am	Object modified	f294	esrs11@yahoo.com	contractor	0
Sep 09, 2005 10:21 am	Object modified	address	esrs11@yahoo.com	contractor	0
Sep 09, 2005 10:21 am	New object created	address	esrs11@yahoo.com	contractor	0
Sep 09, 2005 10:21 am	New object created	f294	esrs11@yahoo.com	contractor	0

10.5 Roles

- I. Click on Tools, and then Roles on the left hand navigation menu.
- II. View Roles and designated rights by clicking on magnifying glass.
- III. Click on Edit icon  to edit the roles.



10.4 Help

It is possible to change the contents of the help sections that appear on the left hand side of the screen when a user clicks on the "Help Bubble".

- I. Under Tools, Click on Help.
- II. Select the interface for which you would like to add, edit, or delete a help option.
- III. To add a new help item, click "Add New". (Continued on Next Page)

Help Contents Screen

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Friday, September 9, 2005 | 11:34 am
User: dagostin@simplicity.com | Logout
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eSRS Integrated Acquisition Environment
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Help
Agency Help Contractor Help Individual Report Help Summary Report Help

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Section Key	Question/Hint	QA Type	Order
agency_contacts: list:list		help	0
agency_contacts: list:new_req		help	0
announcements: form:core	Can you target both agencies and contractors?	help	0
announcements: form:core	How do i add an announcement?	help	1
announcements: form:core	How do I utilize rich test editor?	help	0
common_qa: list:ir_list	What is this help for?	help	0
gov_register: form:ALL	How do I select my Agency?	help	0
manager_a_reports: list:list	The following identifies the status of the Summary Subcontracting Reports.	help	0
manager_a_reports: list:pending		help	0
manager_contracts: list:ALL	What is this section?	help	0
manager_contracts: list:search	What is this search for?	help	0
manager_home: main:home	What's on the Home Page?	help	1
manager_sa_reports: list:pending		help	0

Add New Items 1-13 of 13 < Previous Jump 1 Next >

https://esrs-test.simplicity.com/index.jsp?form&common_qa_tab=0&sys=agency&id=a387f96bfe7aad12552a338dc4e6ae1

- IV. Type the Question.
- V. Enter the Answer.
- VI. Select the Section that the help contents will appear.
- VII. Save your entry by clicking Submit.

Add New Help Contents

The screenshot shows a web browser window with the URL <https://esrs-test.simplicity.com>. The page title is "eSR5 Test - Microsoft Internet Explorer". The browser's address bar shows the URL. The page content is a form titled "[New Help Item]" with a sub-header "Common QA". The form has a "Save" button, a "Cancel" button, and a "Delete" button at the top. The form fields are as follows:

- Question: or Hint...**: A text input field with a blue arrow labeled "IV." pointing to it.
- Response:**: A text input field with a rich text editor toolbar (Font, Size, Bold, Italic, Underline, etc.) above it. A blue arrow labeled "V." points to it.
- Section Key: Section:**: A text input field.
- Mode: Tab**: A dropdown menu with "Section", "Mode", and "Tab" options. A blue arrow labeled "VI." points to it.
- Order:**: A text input field.
- QA Type:**: A dropdown menu with "help" selected.

At the bottom of the form are "Save", "Cancel", and "Delete" buttons. A blue arrow labeled "VII." points to the "Save" button. A sidebar on the left contains a navigation menu with items like "Announcements", "Reports", "Contractors", "Agencies", "Contracts", "Reporting", "Tools", "Email Manager", "Picklist Manager", "System Settings", "Event Log", "Roles", "Help", and "My Account".

11. My Account

11.1 General Information

My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

- I. Under Tools, Click on My Account.
- II. Change the fields that you wish to edit.
- III. Click on "Save".

11.1 Change Password

- I. Under Tools, Click on My Account.
- II. Click on the password tab.
- III. Enter your new password.
- IV. Click on "Save".

Password Change Screen

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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eSRS Integrated Acquisition Environment Electronic Subcontracting System

Friday, September 9, 2005 | 11:39 am
User: [dagostin@simplicity.com](#) | [Logout](#)
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My Account [back](#)

General Information **Password** ? help

[Save](#)

My Password * indicates a required field

Enter New Password:

Verify Password:

[Save](#)

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Done Internet